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14. ABSTRACT This report provides detailed information about the data collection and analysis methods used for the 2009 Special Operations Forces (SOF) Language and Culture Needs Assessment (LCNA) Project. This report only provides information on the methodology and implementation of the data collection strategies used for the LCNA Project so readers can assess the rigor and appropriateness of the findings presented in subsequent issue reports generated as part of this project. This report provides specific details of the SOF LCNA focus groups, such as the focus group protocol and methodology for coding and analyzing the focus group data. A description of the SOF LCNA survey methodology from survey development, deployment and administration to the steps used in cleaning and analyzing the data are presented. By including the majority of the methodology information in this report, redundancy is eliminated from all the issue reports, allowing the focus to be on aspects of the methodology unique to the specific issue report.					
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Special Operations Forces Language and Culture Needs Assessment Project: Methodology Report



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EXECUTIVE SUMMARY

The *LCNA Methodology Report* provides detailed information about the data collection and analysis methods used for the Special Operations Forces (SOF) Language and Culture Needs Assessment (LCNA) Project. This project combined focus groups and a web-based survey across the SOF community to capture the perspectives of SOF operators, leaders and support personnel on language and culture requirements, issues, policy and resources. Focus groups and surveys are often used together as an organizational needs assessment technique, and the practice of integrating multiple data collection techniques is known to improve the quality of findings. Given the constraints (e.g., operations tempo) and complexity of data collection (e.g., collection across multiple services and organizations) in the SOF community, the methods used in this study were selected to collect the most comprehensive data on language and culture in the SOF community. This report provides information so readers can judge the rigor and appropriateness of the study methodology and its execution, allowing them to determine the level of confidence they have in the findings presented in the issue reports. This report provides specific details of the SOF LCNA focus groups, such as the processes followed for conducting the focus groups and for coding and analyzing the focus group data. A description of the SOF LCNA survey methodology from survey development, deployment and administration to the steps used in cleaning and analyzing the data are presented. This report provides no information on participation in the project. That information is provided in the *LCNA Participation Report (Technical Report #2010011003)*. The *Participation* and *Methodology Reports* form foundation reports for subsequent issue reports. By including the majority of the methodology and participation information in these reports, redundancy is eliminated from all the issue reports, allowing the focus to be on aspects of the methodology and participation unique to the specific issue report.

The Special Operations Forces Culture and Language Office (SOFCLLO) commissioned the SOF Language and Culture Needs Assessment Project (LCNA) to gain insights on language and culture capability and issues across the United States Special Operations Command (USSOCOM). The goal of this organizational-level needs assessment is to inform strategy and policy to ensure SOF personnel have the language and culture skills needed to conduct their missions effectively. Data were collected between March and November, 2009 from personnel in the SOF community, including operators and leaders. Findings, gathered via focus groups and a web-based survey, will be presented in a series of reports divided into three tiers. The specific reports in each of these tiers will be determined and contracted by the SOFCLLO. As originally planned, Tier I Reports focus on specific, limited issues [e.g., Inside/Outside Area of Operations (AOR) Use of Cultural Knowledge, Inside AOR Use of Language] Tier II Reports will integrate and present the most important findings across related Tier I reports (e.g., Use of Language and Culture on Deployment) while including additional data and analysis on the topic. One Tier III Report will present the most important findings, implications, and recommendations across all topics explored in this project. The remaining Tier III reports will present findings for specific SOF organizations [e.g., Air Force Special Operations Command (AFSOC), Special Forces (SF) Command]. Two foundational reports document the methodology and participants associated with this project. As mentioned, the additional reports will be determined by the SOFCLLO and may differ from what was originally planned.

The *LCNA Methodology Report* is a foundational report for the LCNA project that is cited by all other Tier I, Tier II, and Tier III Reports. Other reports will reference this foundational report in order to reduce the length of subsequent reports and provide a single source for information about the procedures, materials, and analyses used in this project. The final reports produced will be determined by the SOFCLLO.

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SECTION I: REPORT OVERVIEW

LCNA Methodology Report Purpose

The *LCNA Methodology Report* provides detailed information about the data collection and analysis methods used for the Special Operations Forces (SOF) Language and Culture Needs Assessment (LCNA) Project. This project combined focus groups and a web-based survey across the SOF community to capture the perspectives of SOF operators, leaders and support personnel on language and culture requirements, issues, policy and resources. Focus groups and surveys are often used together as an organizational needs assessment technique, and the practice of integrating multiple data collection techniques is known to improve the quality of findings. Given the constraints (e.g., operations tempo) and complexity of data collection (e.g., collection across multiple services and organizations) in the SOF community, the methods used in this study were selected to collect the most comprehensive data on language and culture in the SOF community. This report provides information so readers can judge the rigor and appropriateness of the study methodology and its execution, allowing them to determine the level of confidence they have in the findings presented in the issue reports. This report provides specific details of the SOF LCNA focus groups, such as the processes followed for conducting the focus groups and for coding and analyzing the focus group data. A description of the SOF LCNA survey methodology from survey development, deployment and administration to the steps used in cleaning and analyzing the data are presented.

Focus groups were conducted between 2 March and 11 June 2009. Section II: Focus Group Protocol and Logistics provides an overview of focus group roles and the processes followed for the SOF LCNA focus groups. Section III: Focus Group Analysis details the data analysis involved in coding the focus group data. The web-based survey was conducted between 26 October and 24 November 2009. A description of the SOF LCNA survey development and administration is provided in Section IV: Survey Protocol and Logistics. Section V: Survey Analysis provides steps used in cleaning the data, analyzing open-ended comments, and quantitative items.

Project Purpose

The Special Operations Forces Culture and Language Office (SOFCLLO) commissioned the SOF Language and Culture Needs Assessment Project (LCNA) to gain insights on language and culture capability and issues across the United States Special Operations Command (USSOCOM). The goal of this organizational-level needs assessment is to inform strategy and policy to ensure SOF personnel have the language and culture skills needed to conduct their missions effectively. Data were collected between March and November, 2009 from personnel in the SOF community, including operators and leaders. Findings, gathered via focus groups and a web-based survey, will be presented in a series of reports divided into three tiers. The specific reports in each of these tiers will be determined and contracted by the SOFCLLO. As originally planned, Tier I Reports focus on specific, limited issues [e.g., Inside/Outside Area of Operations (AOR) Use of Cultural Knowledge, Inside AOR Use of Language] Tier II Reports will integrate and present the most important findings across related Tier I reports (e.g., Use of Language and Culture on Deployment) while including additional data and analysis on the topic. One Tier III Report will present the most important findings, implications, and recommendations across all topics explored in this project. The remaining Tier III reports will present findings for specific SOF organizations [e.g., Air Force Special Operations Command (AFSOC), Special Forces (SF) Command]. Two foundational reports document the methodology and participants associated with this project. As mentioned, the additional reports will be determined by the SOFCLLO and may differ from what was originally planned.

See Appendix A for more details about the 2009 SOF LCNA Project and initially planned report structure.

Relationship of *LCNA Methodology Report* to the LCNA Project

The *LCNA Methodology Report* is a foundational report for the LCNA project that is cited by all other Tier I, Tier II, and Tier III Reports. Other reports will reference this foundational report in order to reduce the length of subsequent reports and provide a single source for information about the procedures, materials, and analyses used in this project. The final reports produced will be determined by the SOFCLO.

SECTION II: FOCUS GROUP PROTOCOL AND LOGISTICS

Consistent with the SOF Language Transformation Strategy Needs Assessment Project conducted in 2005, the first phase of data collection for the SOF LCNA study consisted of focus groups. A focus group is a qualitative research method used to collect responses from a group of people familiar with a topic, service, experience, or product (Zemke & Kramlinger, 1982). Typically, focus groups are composed of 6 to 12 individuals who have been selected for participation from a specified population based on a pre-established set of criteria. Focus group participants are typically selected for their perspective on the focal issue(s) being assessed and are often subject matter experts on the topics to be discussed. A trained facilitator leads the participants through a pre-determined series of questions, discussions, or exercises. The facilitator may probe interesting responses further. The questions and exercises used in the focus groups were adapted from the 2005 focus group protocols to reflect the purpose of the current project.

In this study, 30 focus groups were planned at units across USSOCOM (see Table 1). SOFCLO asked the units to provide participants who were SOF operators with varying degrees of deployment and language experience. Due to scheduling constraints and the lack of availability of operators at units because of deployments, only 23 focus groups were conducted.

Table 1. SOF LCNA Focus Groups

Unit	Location	# Focus Groups Planned	# Focus Groups Conducted
AFSOC			
AFSOC	Hurlburt, FL	3	2
USASOC			
95th CA Bde	Ft. Bragg, NC	2	2
4th POG	Ft. Bragg, NC	2	2
1st SFG(A)	Ft. Lewis, WA	2	2
1st BN 1st SFG(A)	Okinawa, Japan	1	1
5th SFG(A)	Ft. Campbell, KY	1	1
10th SFG(A)	Ft. Carson, CO	1	1
1st BN 10th SFG(A)	Stuttgart, Germany	2	2
19th SFG(A)	Draper, UT	2	1
3rd SFG (A)	Ft. Bragg, NC	1	-
7th SFG (A)	Ft. Bragg, NC	1	-
20th SFG (A)	Birmingham, AL	1	-
20th SFG (A)	Springfield, MA	1	-
WARCOM			
NSWU-2	Stuttgart, Germany	1	1
NSWU-3	Bahrain	1	1
NAVSCIATTS & Special Boat Team 22	Gulf Port, MS	1	1
NSWG-1	Coronado, CA	1	1
NSWG-2	Little Creek, VA	1	1
NSWG-4	Little Creek, VA	1	1
NSWC	Coronado, CA	1	1
MARSOC			
MARSOC (East)	Camp Lejeune, NC	2	1
MARSOC (West)	Camp Pendleton, CA	1	1

Focus Group Roles

Moderator/Facilitator

For a focus group to be constructive, it must be moderated by an experienced professional (McClelland, 1994; Zemke & Kramlinger, 1982). The facilitator focuses participant discussion skillfully to elicit and gather information that addresses the objectives of the study. The facilitator guides the discussion, encourages the participation of all group members, keeps the discussion on track, and probes interesting responses further. The projects' lead researchers moderated the SOF LCNA focus groups and followed focus group moderation best practices as described in *Focus Group Protocol and Logistics (Technical Report# 2009011003)*.

Scribe

To capture information effectively, thematic notes should be taken by a scribe for each focus group. Additionally, the session should be recorded and transcribed for analysis. The thematic notes are vital because the scribe can capture information that the transcript will not reveal. Importantly, the scribe's data are available immediately to adjust focus group protocol or questions. Plus, if the recording is unclear or damaged, there is a thematic and contextual record of the group.

Each SOF LCNA focus group used a scribe in addition to the sessions being recorded and transcribed. The scribe's main responsibility was to take detailed notes of the discussion. The scribes used Livescribe Smart Pens to take notes during the focus group. The Livescribe Smart Pens captured both written and audio notes and were used as an additional form of backup. The scribes also noted any questions or procedural changes for future focus groups and discussed them with the moderator. See *Focus Group Protocol and Logistics (Technical Report# 2009011003)* for more details on scribe best practices.

SOF CLO Representative

A third role was added for the SOF LCNA focus groups; the SOF CLO representative provided legitimate authority and served as the event sponsor. Once the focus groups started, the SOF CLO representative welcomed the participants and described the project. Then, the representative turned the group over to the moderator/facilitator. The SOF CLO representative also served as secondary scribe when there were three personnel to run the group, and the primary scribe when there were two team members.

Focus Group Process

Planning Focus Groups

The SOF CLO representative made initial contact with units to make arrangements for the focus groups. The moderator and scribe were responsible for providing the necessary materials for the focus groups and for conducting the focus groups.

Protocol

The focus group protocol used in the current study was very similar to the one used in the previous study, allowing for meaningful comparison in some areas. However, the current protocol was modified to meet the objectives of the current study as well as to incorporate lessons learned. For example, the current study included questions related to the use of culture on missions. Culture was not a focus of the previous study.

In the current study, participants received a copy of the ground rules which focused on not sharing confidential information, providing only first hand experiences, and respecting each other's view (see Appendix B for the complete list of ground rules). Participant surveys were distributed to gather information about each participant's SOF component, military occupational specialty (MOS), and language background. The survey also gave the participants an opportunity to write additional comments for each portion of the focus group (see Appendix C). Participants were assigned a participant number at

the beginning of each focus group. This number was used during the discussion to protect participant confidentiality.

The full protocol for SOF LCNA focus groups consisted of three blocks designed to elicit information related to major areas of interest. The focus group questions and activity were similar to the protocol used in the previous study, but topics and order were modified somewhat to reflect current priorities. The first block contained questions about language usage and capability requirements as well as cultural knowledge and awareness requirements. The second block asked participants to provide their views on language and culture training, barriers to language and culture skills, motivators for language and culture training, and language testing. The third block was a participant activity for developing a language and culture training strategy. Each block lasted approximately one hour, with short breaks in between. An abbreviated protocol was developed to accommodate focus groups in which time was limited. In some instances, the full protocol was followed for block 1 and block 2; however time necessitated the elimination of the block 3 activity. The moderator followed the interview guide, but deviated as necessary to capture information. The full and abbreviated protocols are provided in Appendices D and E respectively.

Note Formats

Scribes followed a standardized format for taking notes. On each notes page, the question was captured along with the participant's number and the general theme of the participant's comment. At the conclusion of the focus group, the scribe reviewed the notes and added any details remembered, but did not have time to write out fully. A back-up copy of the recordings was also uploaded from the Livescribe Smart Pens to an encrypted flash drive.

Session Recordings

Audio recordings were captured using a Livescribe Smart Pen and two digital audio recorders. The two recorders were used in the event that one of the recorders malfunctioned (which happened in the previous study). The recorders were not turned on while participants introduced themselves to the group or while participants were planning their activity. Participants were notified each time the recorders were turned on.

Transcription

Data from focus groups can be captured in various forms. Transcript based data is the most complete form and is best used for complex studies. This approach relies on notes taken by a scribe and a verbatim transcript of an audio recording from the focus groups (Krueger & Casey, 2009). Due to the complexity of the SOF LCNA project, a transcript based approach was used and was supplemented by scribe notes.

After the focus groups were completed, a firm with expertise transcribed the sessions. Transcribers received the audio recordings from both recording devices used in the focus group sessions. Each focus group transcription was returned as an individual word document. Transcribers followed these guidelines:

- Any time the moderator speaks should be designated with a "Q" at the beginning.
- Any time a focus group participant speaks should be designated with a "P" and their specific participant number (i.e., P3 for participant number 3). Participant numbers should be indicated if and only if it is abundantly clear which participant was speaking. If it is unclear, it should be designated as "P?".
- If words/acronyms are unclear, use consistent phonetic spelling throughout the transcript.
- Listen to the second recorder in attempt to fill-in any unclear/inaudible sections from the first recorder. If sections are still unclear/inaudible, indicate "[indiscernible]" in these sections.

Transcriptions were returned as they were completed via an encrypted flashdrive. The transcripts were then stored and backed up on an encrypted flash drive and stored in a fireproof safe.

SWA reviewed each transcript for accuracy and completeness. Missing information was filled in when it was clearly discernable from the two audio recordings. In addition, notes and recordings from the LiveScribe Smart Pens were used to ensure that the final transcripts were as complete as possible. For instance, during the focus groups scribes recorded the participant number during the discussion. Thus, using these notes, missing participant numbers were added to the transcripts. If clearly identifiable, voice recognition was used to identify participants.

During the review process, LCNA Focus Group Summary Documents were completed to provide a condensed summary of relevant group attributes (e.g., SOF component), main ideas or themes expressed by the focus groups, and recurring issues identified by participants. These summaries served as initial steps in the survey development process, described in Section IV of this report.

SECTION III: FOCUS GROUP ANALYSIS

The transcripts provided a complete record of the focus groups; however data analysis was needed to identify themes from the focus groups. Data analysis began with coding the transcripts with attribute, structural, and content codes. To ensure the quality of the analysis, multiple coders were used and intercoder agreement was calculated. The prevalence of themes was then identified with frequency counts.

Focus Group Transcript Analysis

The transcripts were imported into MAXQDA, a qualitative analysis program that provides a structure for organizing and assigning codes to segments of the discussion, while still maintaining the integrity of the data in its original form. All researchers involved in the focus group analysis were trained on the use of MAXQDA.

The data from the focus groups were coded in multiple phases: attribute coding, structural coding, and content coding. Each phase provided a more detailed analysis of the data.

Attribute Coding

Attribute coding provides “essential information about the data and demographic characteristics of the participants for future management and reference” (Saldaña, 2009, p. 55). Relevant information about participants, location, and other related components of the study were coded as focus group attributes. For this study, the following attributes were coded: SOF component, unit, number of participants, location, type of protocol (full or abbreviated), and inclusion/exclusion of the block 3 activity. These data were recorded at the time of focus group administration, entered into MAXQDA, and linked to the respective transcript. While analyzing the focus group data, coders were able to reference this information. Additionally, within each transcript, codes were assigned to differentiate between moderator questions and participant responses. The block 3 activity portions of the transcript were also coded to reflect which activity (i.e., option 1 or 2) was selected by the participants.

Structural Coding

Structural coding works best for data collected through discrete questions and probes (e.g., focus groups) that are repeated across multiple files (i.e., groups) in a data set (MacQueen, McLellan-Lemal, Bartholow, & Milstein, 2008; Saldaña, 2009). Structural coding makes “subsequent analyses easier by identifying all of the text associated with a particular question and its associated probes” (MacQueen et al., 2008, p. 124). This step is essential for grouping similarly themed discussion to prepare for more detailed content coding.

Researchers developed structural codes using the focus group protocol:

- Mission example language
- Mission example culture
- Core SOF tasks/modalities
- Language capability on the team
- Use of job aids
- Placement of language/culture training
- Effective experiences in language/culture training
- Ineffective experiences in language/culture training
- Barriers, motivators (other than pay)
- Monetary incentives (Foreign Language Proficiency Pay/Foreign Language Proficiency Bonus)

- Language testing
- Integration with other training
- Distance Learning/Technology-delivered Training
- Special Operation Forces Tele-training System
- Suggestions
- Block 3 activity1
- Block 3 activity 2

The data were broken into broad, similarly-themed segments for this phase of structural coding. Within each segment, the question from the moderator and the complete response from the participant(s) were included. Additionally, any dialog between the moderator and the participant resulting from the initial question was captured in the segment. Including the full elicitation preserved both the flow of the focus group discussion and the full context of the dialog on a particular topic (MacQueen et al., 2008). Coders read the transcripts and placed the selected text segments into the code designated as best describing the content of the segment. The structural codes were used to classify the data for inclusion in the SOF LCNA Project Database and were also used as the basis for organizing subsequent analysis.

Codebook Development

Codebooks and coding instructions are developed as part of the process for creating a shared mental model among coders for applying the codes. By establishing a detailed guideline for applying content codes, the interchangeability of coders is enhanced (i.e., a new coder could be added to the process at any time without altering the results of the study). Furthermore, coding instructions allow others to replicate the results of the study or to apply the same codes to additional information collected at a later date.

For this project, in order to establish relevant content codes, text segments assigned to each structural code were reviewed for recurring themes. Research team members reviewed themes to ensure they were represented and to further clarify any unclear codes. Then the coders developed definitions for each theme and rules about when the codes should and should not be applied in accordance with established guidelines (MacQueen, McLellan, Kay, & Milstein, 1998). Research team members conducted a final review of the codes and their definitions for clarity and conciseness. Where appropriate, the relevant codebook will be attached to its corresponding report.

Unitizing

Unitizing is the process of creating distinct units of text within the data set. This process helps determine which portions of text to include in further analysis and which portions are not relevant to the research purpose (Krippendorff, 2004). In addition, this process allows researchers to further segment elements of the discussion within the structural codes and eases the coding burden in subsequent analysis. There are several different methods for unitizing data, but in general it is recommended that each unit be separate and distinct from all other units and that units should be as small as possible while still being meaningful.

Before the content codes were applied, coders unitized the data. Researchers followed specific guidelines listed below:

1. Each discrete unit should represent one theme/critical incident.
2. A discrete unit should be understood on its own without additional context.
3. A discrete unit may encompass multiple exchanges.
4. A discrete unit should NOT reflect multiple participants who state the same point of view.
5. A discrete unit should NOT include moderator questions when the participant's response can be understood alone.

Content Coding

Once the data are unitized, content codes can be applied. This approach further identifies more specific themes that emerge from participants' answers to the focus group prompts. Each discrete unit of text identified during unitizing is content coded. Although it is preferable if a single code can be applied to a single unit of text, simultaneous coding (i.e., applying multiple codes to a single unit of text) is often necessary with complex topics and discussion. This form of coding can be used when it is impossible to capture the sentiment of the text with a single code (Saldaña, 2009).

Coders began the content coding process by reviewing the relevant codebooks and making any necessary modifications. The unitized segments were then independently coded. Within the content coding phase, simultaneous coding techniques were used to accommodate the need to describe specific units using multiple characteristics.

Quality Assurance

Coder training, the use of multiple coders, and the calculation of intercoder agreement are used to enhance the quality of analysis throughout the coding process.

Prior to each phase of coding, each coder was trained to ensure that each coder understood and executed the same process. Training sessions included a review of the purpose of each phase of the coding process along with guidelines for coding, practice coding, and calculating intercoder agreement to determine if the coders were ready to proceed. Two coders were assigned to each topic area for structural coding, unitizing, and content coding. Coders worked independently to assign codes to segments of text and then met to review disagreements and discuss to consensus.

Researchers considered several methods of calculating agreement for this project. The most appropriate index for agreement was Krippendorff's alpha, a reliability measure that accommodates nominal data and agreement due to chance. However, Krippendorff's alpha does not accommodate the unitization process or simultaneous coding. Due to these restrictions, Guetzkow's U and absolute agreement were used for this project.

During unitization, Guetzkow's U (Guetzkow, 1950) was most appropriate for assessing intercoder agreement. Agreement was calculated on an item by item basis for each content area in the unitization process. The coders discussed any text segments where they disagreed and reached consensus about the appropriate unit to apply.

Absolute agreement was appropriate for structural coding and content coding. This method assessed intercoder agreement by calculating the percentage of units that the coders agreed upon (Bernard & Ryan, 2010). Higher levels of absolute agreement were an indication that the coders were applying the codes consistently.

Agreement was calculated at multiple points during coding for each content area. The codebooks were reviewed and revised when the agreement was low and indicated that the coders had consistent differences in the use of the codes. When agreement standards were not met and in all cases of disagreement, the coders discussed to agreement.

Focus Group Quantitative Analysis

Following the qualitative analysis, the frequency of text segments assigned to each code was calculated in MAXQDA to assess the prevalence of themes across all focus groups. MAXQDA also allowed for complex retrieval of segments, which produced the frequency for these segments. Results from analyses

of the focus group data were used to supplement the results of the quantitative survey analyses and are presented in related project reports.

SECTION IV: SURVEY PROTOCOL AND LOGISTICS

The second phase of data collection included a web-based survey. Web-based surveys have been used as effective data collection tools in the SOF community (e.g., *The SOF Language Transformation Strategy Needs Assessment Project Technical Report #20040606*; Thompson, Surface, Martin, & Sanders, 2003; Thompson & Surface, 2009). Surveys are often used in combination with focus group information. This combination allows researchers to capitalize on the unique contributions and strengths of each data collection method. Focus groups provide greater depth of information on selected topics while surveys provide a wider spectrum of information by targeting a larger number of participants. Additionally, focus groups can inform the development of a survey. Common themes that emerge from focus group results inform survey topics and appropriate expressions/language familiar to the target audience (Morgan, 1996).

Survey Development

Item Planning

Survey items should reflect the purpose of the project and should be grounded in the project's research questions. Therefore, *The SOF Language Transformation Strategy Needs Assessment Project* served as an initial guide for the research questions for this project (*Technical Report #20040606*). Additional topic areas of interest and research questions were identified based on current client interests (i.e., assessing culture needs) and major themes identified in the 23 focus groups conducted with SOF personnel. One of the advantages of conducting focus groups prior to developing the survey is the ability to incorporate current issues from the field for validation with a larger and more representative group of participants.

Item Writing

Best practices indicate that multiple sources should be consulted when writing items. For instance, information gathered during focus groups can be used to generate and refine survey topics and items (Morgan, 1996). Relevant literature may also be consulted during item generation (Hinkin, 1998). The use of focus groups and existing literature provides confidence that the content of the survey will be relevant to the project's purpose.

Consistent with best practices, three sources were consulted when generating items for the SOF LCNA survey. Item development began with a review of *The SOF Language Transformation Strategy Needs Assessment Project* survey items (*Technical Report #20040606*). The items were reviewed for their relevance to the present project and to determine if items needed to be refined. An initial review of the focus groups and literature relevant to the project purpose were also used to inform item development. Information from each of these areas was used to draft items in accordance with the project purpose.

In order to write items that yield useful results, it is essential to follow guidelines such as the following which were used in the present project (adapted from Fowler, 2002).

1. Write short, simple statements.
2. Use language that is familiar to the target audience.
3. Use a consistent perspective – don't mix items that assess behaviors with items that assess affective (i.e., emotional) responses.
4. Avoid double-barreled items; each item should address a single issue.
5. Avoid leading questions that may bias responses.
6. Avoid items expected to have little variance (i.e., show little difference between respondents).
7. Carefully consider the use of negatively worded items.
8. Use scales appropriate to the construct you are measuring.
9. Consider the use of the data generated from the item. Only use items that will produce useful results.
10. Consider the key research questions that need to be answered.

To ensure the items developed for this survey followed these guidelines, all item writers were trained on how to write effective items before item development began. The training covered the following topics: the project goals, the target audience, and the research questions to be addressed by the project. Item writers were trained on the item development process as well as the guiding principles for developing survey items.

Response Format

During item development, careful consideration must be given to the response scales used for closed-ended items. Most often response scales have five options. The use of fewer response options limits the ability to assess differences between the respondents (Hinkin, 1998). The use of additional response options may be warranted for some items, such as those used to reflect the respondent's background. Scale response options should be balanced and appropriate for the content of the question to aid in interpretation of the results. Additionally, we did not want to use the standard Likert-type agreement scales (*Strongly Agree* to *Strongly Disagree*) for the survey items, unless there were no other acceptable options. Items with scales targeted to the underlying construct often provide a better measure of the construct than items using an agreement scale (Fowler, 2002).

For the SOF LCNA survey, item scaling occurred in conjunction with item development, and the scales were developed to reflect the content of the item. For example, one item asked "how *effective* was the pre-deployment training you received on using interpreters"; thus, the response options were: *not effective*, *slightly effective*, *moderately effective*, *effective*, *very effective*. This is in contrast to using an agreement scale for an item such as "pre-deployment training received on using interpreters was effective." Scales targeted to the construct allow for a more consistent and meaningful interpretation of the results. Targeted scales were used whenever appropriate and feasible.

Various types of scales were used in the present project, including: categorical scales, Likert-type scales, and client-specific scales. In addition, open-ended items were included, allowing respondents to provide responses in their own words. Different scales were used in order to obtain the most relevant information from each item asked.

Item and Scale Review

Individuals who are knowledgeable of the project purpose and the target audience should review all of the items and their corresponding scales. A review of the items should focus on evaluating the content of the items to determine if they are related to the project. Additionally, the items should be reviewed to ensure the wording is suitable for the target audience (Fowler, 2002).

Therefore, the SOF LCNA survey items and scales were subjected to a series of reviews by internal and external expert reviewers. The items were reviewed for appropriateness of item content for the audience, relevance of the response scale, and general readability. Revisions were then made to the items based on these reviews. A complete description of survey topics can be found in Appendix F.

Survey Development Branching

As items were generated they were entered in Qualtrics, a web-survey design program. Qualtrics allowed creation of the complex topic and item branching logic required for this survey. The branching logic reduced the item burden for respondents by sending them to topic areas based on their reported experience. For example, only respondents who indicated that they had deployed within their AOR received questions regarding the use of language and culture on deployments within their AOR.

With the interests of the client and the perspectives of the different participants groups in mind, a list of topic areas was created for each possible participant group in the survey. For the complete list of possible survey participants and their respective survey topic areas, see Appendix G. Therefore, participants for

certain groups only received items in areas deemed to be appropriate for their group and the order was standardized. Additionally, participants were branched past sections if they did not have relevant experience. After the branching planning and maps were completed, branching logic was applied both to the background structure (i.e., by topic area) of the survey and within each topic area (i.e., at the item level) in Qualtrics.

Sample Selection

Individuals should be invited to participate in a survey based on the alignment of their background and experience with the project purpose. Since, the purpose of this project is to identify the language and culture needs for SOF personnel, members of the SOF community were targeted for participation. It was expected that some survey distribution channels could potentially lead to participation from non-SOF respondents; therefore, the survey was designed to screen out participants whose perspectives were not being targeted as part of the data collection effort. To prevent non-SOF participants from taking the survey as SOF-participants, the design allowed them to complete a version of the survey, instead of other options. The data collected from non-SOF participants is beyond the scope of this project.

Increasing Response Rate

In order to increase the likelihood that survey respondents are representative of the target audience, it is important to encourage all eligible participants to respond. Identification of a sponsor for the survey is one method for increasing the number of respondents (Simsek & Veiga, 2001). This sponsorship can be provided from high ranking personnel in the organization. For this reason, support for the survey was sought from Admiral Eric T. Olson, Commander, U.S. Special Operations Command. On 30 October 2009, Admiral Olson indicated his support for the survey, and encouraged participation in the survey through a memo issued to commanders throughout USSOCOM (see Appendix H).

Responses to surveys are also increased by publicizing the survey and sending reminders to the target audience. By continuously monitoring responses to the survey, response rates from specific components of the target audience can be improved by sending reminders tailored to them (Rogelberg, 2006). The SOF LCNA survey was publicized through several means. Emails were sent throughout the survey administration and survey links were posted on AKO, DKO, and SOFTS web-pages. Additionally, an SF command tasker was sent out to all USASFC personnel, extending the survey end date past the original 13 November date, to ensure all personnel had the opportunity to participate. A timeline of the survey recruitment process is provided in Figure 5.

It is also important to encourage respondents to complete the entire survey. This can be accomplished by limiting the number of items in the survey and ensuring that participants only receive items relevant to their background (Rogelberg, 2006). Throughout the SOF LCNA survey, branching logic was used to direct respondents to items relevant to their background and experiences.

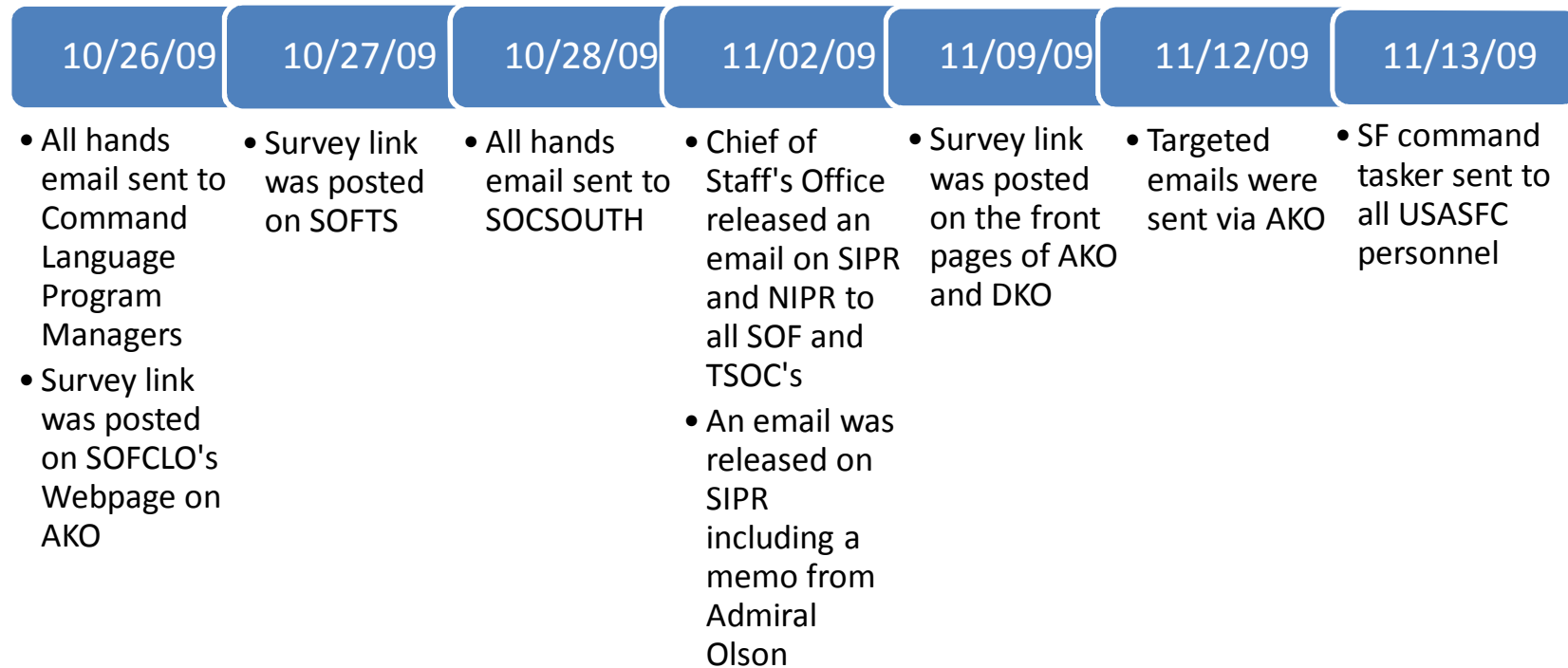
Survey Review

Once the survey was programmed in Qualtrics, the branching and display logic were tested. Reviewers completed sample responses as if they were a member of the target audience to ensure they were directed to the correct pages, received the items relevant to the respondent, and the correct response options were displayed. This review process was completed for each possible survey participant perspective and each possible branching response in order to ensure full functionality. Additionally, the client and other subject matter experts reviewed the functionality of the survey to ensure the branching for each item was relevant and accurately represented the vocabulary of the target audience.

Features in Qualtrics also allowed for the generation of random test responses to the survey. A test sample of over 500 responses was created to further ensure functionality and allowed researchers to preview the data output and reporting functions available in Qualtrics.

Respondent Tracking

Qualtrics was used to administer the survey and manage the data. Through Qualtrics, reports were generated each day that the survey was available for respondents to complete. These reports indicated the total number of respondents to the survey. Features within Qualtrics were also used to assess the number of responses from each component of the target audience. Creating item summary reports for the client provided the information needed to modify the survey recruitment process in an effort to increase response rates across the SOF community.

Figure 5. Survey Recruitment Timeline

SECTION V: SURVEY ANALYSIS

Analysis Preparations

At the completion of data collection, the survey data were downloaded from Qualtrics into a comma separated values (CSV) spreadsheet. Due to the large number of responses and items on the survey, several different programs were used for analysis including: Qualtrics, Microsoft Excel and CSV spreadsheets, and SYSTAT. Qualitative data from the survey were analyzed in Microsoft Excel. The use of different programs was also necessary because each had its own limitations that were often resolved by the use of another. The drawback to using multiple programs was the amount of data preparation necessary to ensure each file contained the appropriate amount of information. This was especially important with the use of Excel and SYSTAT because of the data size restrictions in these programs.

Data Cleaning

In order to ensure that the survey data were an accurate reflection of the participants' responses, it was necessary to recode (i.e., assign new quantitative values) some of the questions. For background questions where an exhaustive list of options was prohibitive, respondents were given the option to select "Other" and type in a response that best reflected their background. Therefore, it was necessary to assign new values to these text responses in order to appropriately classify the respondents and include them in subsequent analyses.

One area where this approach was necessary was for participants who indicated they were part of the SOF community but selected "Other" because they did not see an option listed that described their current role within the SOF community. It is imperative to be able to accurately describe the respondent's role in the SOF community to evaluate any differences in responses that may occur across the SOF community. For this item, the client was consulted and asked to evaluate the responses to clearly establish their role within SOF. The client's feedback was then used to assign new values to these responses, thereby placing them with their correct role. For example, a number of SOF participants who indicated "other" as their current role in the SOF community identified themselves as Civil Affairs or Psychological Operations personnel. These are both valid roles in the SOF community; based on other background information such as MOS and deployment experience, these individuals were recoded as SOF operators or SOF unit leaders.

For the additional areas where this approach was taken, the client's input was not needed. There were 21 questions providing enough unique responses to support the need to create values to represent those responses and update the data to reflect these additions. For each question, the text responses were reviewed to determine how many new values were needed to accurately portray the respondents' backgrounds. If a response was submitted by more than one respondent, a value was assigned to the response and the data was updated. For example, USASOC participants were asked to indicate their MOS, and 20 respondents who indicated "other" wrote in 68W as their MOS. Due to the large response for this MOS, a 68W option was created and the appropriate respondents were recoded. Additional items where responses were recoded included language background and SOF mission type.

Coding Comments

The survey offered many opportunities for respondents to answer open-ended questions, providing comments from their perspectives on various issues. For these questions, the respondent was simply asked to type in any comments they had relating to the question. Since these items resulted in data that were in text format only, the data needed to be coded before it could be analyzed.

Coding Process

Two coders collaborated on each survey content area containing open-ended comments. Each coder independently read the respondents' comments related to their topic area and noted the content of those

comments. The coders then compared the combined comment lists with the existing content codes developed for the focus group data (see Focus Group Analysis Section). If the content area was captured by an existing code, it was used as a comment code. The remaining content areas were reviewed for major themes. The coders compared their list of themes and came to a consensus on the themes represented by the data and the appropriate names for the content codes that would represent the themes. Once the code list was finalized, the coders used both the focus group codes and the newly developed codes for content coding. In a Microsoft Excel spreadsheet, coders independently assigned the number associated with the relevant code(s) in a column next to each survey comment.

Quality Assurance

Quality assurance was ensured using the same methods described in Section III: Focus Group Analysis. All coders were trained on the coding process. Multiple coders were used, and rater agreement was calculated after all comments were coded. Absolute agreement was calculated at the completion of coding for each qualitative item. The coders then met to come to a consensus on any areas of disagreement.

Quantitative Items

Items that presented the respondent with a set of response options were analyzed using the appropriate descriptive or inferential statistics. Descriptive statistics (e.g., frequencies and averages) were calculated to provide further information about participants and the distribution of their responses. Additionally, inferential statistics (e.g., analysis of variance, *t*-tests) were used to determine if any observed differences were likely to exist in the broader population of interest. The specific analyses used for quantitative items differ from topic to topic, depending on the item types involved and information requirements. For example, in the *LCNA Training Emphasis Report (Technical Report #2010011005)*, individual quantitative items were analyzed using frequencies and averages. In order to compare group differences (e.g., civil affairs v. psychological operations) on training emphasis, items were analyzed using analysis of variance and *t*-tests. Each issue report will provide a brief description of the analysis protocol.

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ABOUT SWA CONSULTING INC.

SWA Consulting Inc. (formerly Surface, Ward, and Associates) provides evidence-based solutions for clients using the principles and methods of industrial/organizational (I/O) psychology. Since 1997, SWA has advised and assisted corporate, non-profit and governmental clients on:

- Training and development
- Performance measurement and management
- Organizational effectiveness
- Test development and validation
- Program/training evaluation
- Work/job analysis
- Needs assessment
- Selection system design
- Study and analysis related to human capital issues
- Metric development and data collection
- Advanced data analysis

One specific practice area is research and consulting on foreign language and culture in work contexts. In this area, SWA has conducted numerous projects, including language assessment validation and psychometric research; evaluations of language training, training tools, and job aids; language and culture focused needs assessments and job analysis; and advanced analysis of language research data.

Based in Raleigh, NC, and led by Drs. Eric A. Surface and Stephen J. Ward, SWA now employs close to twenty I/O professionals at the masters and PhD levels. SWA professionals are committed to providing clients the best data and analysis with which to make solid data-driven decisions. Taking a scientist-practitioner perspective, SWA professionals conduct model-based, evidence-driven research and consulting to provide the best answers and solutions to enhance our clients' mission and business objectives.

For more information about SWA, our projects, and our capabilities, please visit our website (www.swa-consulting.com) or contact Dr. Eric A. Surface (esurface@swa-consulting.com) or Dr. Stephen J. Ward (sward@swa-consulting.com).

APPENDIX A: ABOUT THE LCNA PROJECT

In 2003-2004, the Special Operations Forces Culture and Language Office (SOFCLLO; formerly, SOFLO) sponsored the SOF Language Transformation Strategy Needs Assessment Project to inform the development of a language transformation strategy in response to a GAO report (2003). This SOF Language Transformation Strategy Needs Assessment Project collected current-state information about language usage, proficiency, training, and policy issues (e.g., Foreign Language Proficiency Pay, FLPP) from SOF personnel, SOF unit leaders, and other personnel involved in SOF language. The project used multiple data collection methods and provided the SOFCLLO with valid data to develop a comprehensive language transformation strategy and advocate for the SOF perspective on language issues within the DoD community.

In a continuing effort to update knowledge of language and culture needs while informing strategic plan development, the SOFCLLO commissioned the 2009 SOF Language and Culture Needs Assessment Project (LCNA) to reassess the language and culture landscape across the United States Special Operations Command (USSOCOM) and develop a strategy for the next five years. Data were collected between March and November, 2009 from personnel in the SOF community, including operators and leaders. Twenty-three focus groups were conducted between March and June, 2009. A comprehensive, web-based survey designed to gather information from both operators and leaders in the SOF community was launched on 26 October and closed on 24 November, 2009.

This project's findings will be disseminated through reports and briefings (see Appendix A, Figure 1 for an overview). Two foundational reports will document the methodology and participants associated with this project. The remaining reports will be organized in three tiers. The specific reports in each of these tiers will be determined and contracted by the SOFCLLO. As originally planned, twenty-five Tier I Reports will focus on specific, limited issues [e.g., Inside/Outside Area of Operations (AOR) Use of Cultural Knowledge, Inside AOR Use of Language]. Tier II reports will integrate and present the most important findings across related Tier I reports (e.g., Use of Language and Culture on Deployment). Most, but not all, Tier I reports will roll into Tier II reports. One Tier III Report will present the most important findings, implications, and recommendations across all topics explored in this project. The remaining Tier III reports present findings for specific SOF organizations [e.g., Air Force Special Operations Command (AFSOC), Special Forces (SF) Command]. All Tier III reports will be associated with a briefing. As mentioned, the additional reports will be determined by the SOFCLLO and may differ from what was originally planned.

In June, 2009, the GAO reported that the Department of Defense is making progress toward transforming language and regional proficiency capabilities but still does not have a strategic plan in place to continue development that includes actionable goals and objectives. The findings from this study can be used by the SOFCLLO and leaders at USSOCOM to continue strategic planning and development in this area.

This project design, logistics, data collection, initial analysis and first eight reports of this project were conducted by SWA Consulting Inc. (SWA) under a subcontract with SRC (SR20080668 (K142); Prime # N65236-08-D-6805). The additional reports mentioned above are proposed for the future (TBD by the SOFCLLO). For questions or more information about the SOFCLLO and this project, please contact Mr. Jack Donnelly (john.donnelly@socom.mil). For specific questions related to data collection or reports associated with this project, please contact Dr. Eric A. Surface (esurface@swa-consulting.com) or Dr. Reanna Poncheri Harman (rpharman@swa-consulting.com) with SWA Consulting Inc.

Appendix A, Figure 1. Report Overview



Note: Foundation reports are referenced by every other report. Colors represent Tier I reports that roll (integrate) into an associated Tier II report. Reports in black are final reports on the topic but may be cited by other reports. Tier II reports roll into the Tier III reports. All Tier III reports include an associated briefing.

APPENDIX B: GROUND RULES FOR SOF FOCUS GROUP SESSIONS

Ground rules are provided to help the focus group flow smoothly. These ground rules must be posted so that all focus group participants can see them or distributed to all participants.

1. Do not include any classified information/details when discussing critical incidents of language usage from the field.
2. Every participant's view is important, and everyone has equal say in the discussions. Everyone's view is of value. Listening is as important as speaking.
3. Focus group participants should treat all opinions and views expressed by other participants inside the focus group as privileged. Confidentiality is very important.
4. Differences of opinion are good.
5. There will be no personal attacks on anyone. If you disagree with a comment, state your point without making it personal.
6. We must only speak from our personal experiences and observations and not from hearsay.
7. We must all act with respect and professionalism at all times during the focus group.
8. Everyone must actively participate in the discussions, and no one person should dominate.
9. In order to respect others, there should be only one person speaking at a time, and there cannot be any side conversations during the discussions. If you wish to speak, get the moderator's attention (for example, raise your hand).
10. To protect your confidentiality, the names of participants will not be used or reported in the official records. After transcription, the audio files will be erased to further protect participants. The recording devices are not activated until after the introductions. Refer to other group members by their participant number only.

APPENDIX C: FOCUS GROUP PARTICIPANT SURVEY



SOF Language and Culture Needs Assessment Focus Group Participant Survey



Please Indicate Your SOF Component: _____

Please Indicate Your MOS/NEC/AFSC: _____

What is your primary foreign language? _____

Please indicate your most recent proficiency scores in this language:

	0	0+	1	1+	2	2+	3 (or above)
Listening	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reading	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Speaking	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

What is your secondary foreign language (if applicable)? _____

Please indicate your most recent proficiency scores in this language:

	0	0+	1	1+	2	2+	3 (or above)
Listening	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reading	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Speaking	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please provide any additional thoughts or comments about the content we discussed in Block 1 (Language and Culture):



SOF Language and Culture Needs Assessment
Focus Group Participant Survey



Please provide any additional thoughts or comments about the content we discussed in Block 2 (Training):

Please provide any additional thoughts or comments about the content we discussed in Block 3 (Activity):

For your primary mission, which is _____ (e.g., UW), rate the importance of the following to mission success:

	Not Important <i>(I <u>can</u> do my mission without it)</i>		Important		Critically Important <i>(I <u>can't</u> do my mission without it)</i>
Language <i>(without Interpreters)</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Culture	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Interpreters	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

APPENDIX D: FULL PROTOCOL FOCUS GROUP INTERVIEW GUIDE

This script will guide you in moderating the focus group(s) that you are assigned.

Sample Timeline & Script

8:15/13:15

[Participants arrive, sign-in, receive focus group guidelines, and name plates (participant numbers only); name plates will have a number 1 to 10 for the note takers and other participants. Give them a copy of the first question block and the participant survey.]

8:30/13:30

SOFLO Liaison: Please take a seat so we can begin. Good morning/afternoon! My name is **[SOFLO Liaison name]**, and I am here on behalf of the SOF Language Office. We want to know your views about language proficiency, training, and related issues. The information that you provide will help us to understand the issues from the SOF Operators' perspective. Your input will help us develop a comprehensive language and culture strategy for SOF. The SOF language and culture strategy influences how and what type of training and testing are done; how incentive pays are structured, etc. Thank you for taking time to talk with us today and caring about SOF language. Now, I want to introduce the person who will be conducting this focus group **[Moderator Name]**.

8:35/13:35

Moderator: Good morning/afternoon! I want to echo what **[SOFLO Liaison Name]** said. Your input is important to our project, and we appreciate your time. We will be using the information you provide to determine current language and culture requirements and other issues to inform future policy. Your opinions and experience play an important role in developing the SOF language and culture strategy.

When you arrived, you received a list of ground rules designed to ensure the session runs smoothly. **[Go over a few of the rules.]** If you have a comment, please get my attention by raising your hand or by some other means that doesn't disrupt the conversation.

Unclassified version
No names or ranks
Speak one at a time; Get my attention
Speak clearly, loudly and toward the microphone
Military Jargon and Acronyms

There are no "right or wrong" answers to our questions. We are interested in your honest thoughts and opinions. You'll notice that we are taking notes of our discussion, and we will be recording this focus group so that the transcripts can be analyzed. To protect your confidentiality, the introductions are not recorded and no names or group ids are assigned to the transcripts. Once the "media files" are transcribed, it will be erased (to prevent voice recognition).

As a psychologist, it's important to me to protect your confidentiality. I want to assure you that the transcript we make of our discussion will not be used for any purpose other than research and analysis. **No one involved in the focus group will be identified by name. The recorders will not be activated until after the introductions. When referring to yourself or others, please use only their participant numbers.** Please speak one at a time and regard the note taking as simply an extension of my (the moderator's) memory.

The format of today's session is on your handout. **[Review agenda]**. The times are a rough estimation. The segments will vary in time.

[The moderator starts the introduction by talking about himself/herself.]

I'd like to begin by going around the circle, starting at my right, and letting each of you introduce yourself *briefly* by telling us the following things **[write on first page of the board]**:

- **MOS/NEC (naval enlisted specialty code)/AFSC (Air Force Specialty Code)**
- **SOF Component**
- **Years in Service/SOF**
- **Language(s) and where trained in language**

[Each participant speaks]

Thank you.

Now, I think we all know a little bit about each other, I'd like to get started with the questions.

[Moderator will ask questions and summarize after each question as discussed.]

8:50/13:50

[Moderator should remind the participants to communicate critical incidents in such a way that they are unclassified.]

First Question Block**Part 1: Language Usage & Capability Requirements:**

Q1: *"Tell us about a situation where having language skills and capabilities contributed to mission success?"*

- *What was the proficiency level? How many on the team had language capability?*
- *Which of the core SOF tasks (e.g., DA, SR, FID) were involved?*
- *Was the mission inside or outside your AOR?*
- *Did you use an interpreter? (Was the interpreter a contractor or military linguist?)*
- *Did you do pre-mission language prep?*
- *Did you use job aids (e.g., Kwikpoint) to help prepare? If yes, what's your evaluation of the job aid?*

Q2: *"Tell us about a situation where not having sufficient language skill or capabilities was a challenge for the mission or degraded the mission outcome?"*

- *Which of the core SOF tasks (e.g., DA, SR, FID) were involved?*
- *How did it take away from mission accomplishment?*
- *How did you overcome not having sufficient language capabilities?*
- *How would having better language skills enhance the mission?*

Q3: *"Which SOF mission activities require language capabilities? Please be specific in terms of language skill type (reading, listening, speaking, writing), activity (e.g., training troops on weapon maintenance, negotiation, etc.), and criticality of the activity. Be as descriptive as possible when talking about the specific activities."*

Q4: “What types of language capabilities should the team have? Should everyone on the team (or only a few) have some capability? What levels of capability should the team have? Should there be multiple languages on a team?”

Part 2: Cultural Knowledge and Awareness Requirements:

Q5: “Tell us about a situation where having cultural knowledge and awareness contributed to mission success?” (Provide as much detail as possible)

- Which of the core SOF tasks (e.g., DA, SR, FID) were involved?
- Did you have any pre-mission culture training?

Q6: “Tell us about a situation where not having sufficient cultural knowledge and awareness was a challenge for the mission or degraded the mission outcome?”

- Which of the core SOF tasks (e.g., DA, SR, FID) were involved?
- How did it take away from mission accomplishment?
- How did you overcome not having sufficient cultural knowledge and awareness?
- How would having better cultural knowledge and awareness enhance the mission?

Q7: “Which SOF mission activities require cultural knowledge and awareness? Please be specific in terms of activity (e.g., training troops on weapon maintenance, negotiation, etc.) and criticality of the activity. Be as descriptive as possible when talking about the specific activities.”

[Moderator summarizes first block, reminds participants to add any additional comments from the first block on the survey, and calls a short break.]

9:50/14:50

Break 1 (10 minutes)

10:00/15:00

Second Question Block (Training):

Q8: “Where do you think language and culture training should be provided/offered in the development of a SOF operator? Please think about this question across the entire career lifecycle and in terms of all forms of training (e.g., pre-deployment).”

- Should institutional, involuntary training be provided for [their SOF component]?

Q9: “We are interested in your experiences with language/culture training. Tell us about the most effective language/culture training in which you have participated. Be sure to consider all forms of training (e.g., pre-deployment). Be descriptive in terms of why it was effective.”

Q10: “Tell us about the least effective language/culture training in which you have participated. Be sure to consider all forms of training from initial acquisition to sustainment and enhancement. Be descriptive in terms of why it was not effective.”

[Moderator may only get to one or two of the following so they should be mixed up across groups. But, get to as many as possible.]

Q11: *“What are some of the barriers or things that keep you from maintaining or enhancing your language/culture skills?”*

Q12: *“What things would motivate you or make it easier for you to take advantage of language/culture training?”*

Q13: *“Are you motivated to increase your language proficiency level to qualify for FLPB (Foreign Language Proficiency Bonus)?”*

Q14: *“What are your thoughts on language testing? Are the current tests an adequate indicator of your language proficiency?”*

Q15: *“Can language/culture training be integrated into other SOF training? Have you participated in any of these programs? What did you think?”*

Q16: *“Classroom training and live environment training (LET) programs are not always available. Is distance learning (DL) or technology-delivered training (TDT) a viable option for training language and culture?” Give example if necessary.*

Q17: *“Have you ever completed language training via SOFTS? What are your thoughts about SOFTS?”*

[Moderator summarizes second block, reminds participants to add any additional comments from the second block on the survey, and calls a short break.]

11:05/16:05

Break 2 (5 minutes)

11:10/16:10

[This block has the potential to go over in terms of time.]

Third Question Block (Activity: Developing a language/culture training strategy):

You are to divide into 3 teams of 2 to 5 people (as assigned by the moderator). You will have 20 minutes to develop a decision briefing to be given to your unit commander. You should select a representative to brief, and your group should write up the basic points of your briefing on the paper provided. You will have 5 minutes to brief it. You will be given a 5-minute warning after 15 minutes have passed.

Please select one of the following:

1. The Commander of your SOF Unit asks you to develop a strategy and plan to transform current language capabilities and cultural knowledge and awareness to ensure mission success. He wants this yesterday. He asks you to prepare a 5-minute decision brief immediately, and he indicates your language/culture improvement strategy and plan should consider/address the following:

- Mission language/culture requirements
 - which language skills/cultural knowledge and awareness are relevant
 - what proficiency levels are needed
- Where training fits into the career lifecycle

- The most effective training options for initial acquisition and sustainment/enhancement training
 - whether initial acquisition training needs to be institutionalized for all operators
 - should training at all levels be voluntary or involuntary
 - The use and role of distance learning and other technology solutions
- Barriers that interfere with or prevent the development and maintenance of language capabilities and cultural knowledge and awareness
 - What are these barriers?
 - How can they be removed?
- What programs would you recommend to motivate improved language proficiency and cultural knowledge and awareness?

2. The Commander of your SOF unit asks you to identify the top 3 actions that can be taken to improve language capability, cultural knowledge and awareness, and readiness in your unit. He wants this yesterday. He asks you to prepare a 5-minute decision brief immediately. For each action, you must provide (1) the language capability, cultural knowledge and awareness, and readiness issue the action impacts; (2) a rationale for how it impacts the language/cultural issue; (3) a rationale for why it is the best option for resolving the issue; (4) the specific details of the action's implementation; (5) an idea of where the action fits into the current command language/culture program/strategy; and (6) any other information you believe the Commander needs to make a decision.

Divide into 3 teams of 2 to 5 people [depends on who shows]. You will have 20 minutes to develop your strategy and plan. You should write up the basic points to present to the group. You will have 5 minutes.

[The recorders are turned off, and the groups work. They are given chart paper and marker.]

[After 15 minutes, a 5-minute warning is given.]

[Recorders are turned back on and each group presents. The moderator asks the groups questions about their plans as appropriate.]

12:05/17:05

[Moderator will summarize entire focus group session. Be specific about any themes that emerged from the discussion.]

Before we conclude does any one have any additional comments or topics related to language or culture that they would like to discuss. **[Remind participants to take a few minutes to complete the survey.]**

[To SOFLO Liaison] Do you have any thing you would like to add?

Thank you all for your generosity in taking the time out of your busy schedules to talk with us today.

[Moderator ends interview.]

APPENDIX E: ABBREVIATED PROTOCOL FOCUS GROUP INTERVIEW GUIDE

This script will guide you in moderating the focus group(s) that you are assigned.

Sample Timeline & Script

8:15/13:15

[Participants arrive, receive focus group guidelines, and the participant survey. Numbered cards will be at each empty seat and will be numbered from 1-10. Participants will be referred to by number during the focus group.]

8:30/13:30

SOFLO Liaison: Please take a seat so we can begin. Good morning/afternoon! My name is **[SOFLO Liaison name]**, and I am here on behalf of the SOF Language Office. We want to know your views about language proficiency, training, and related issues. The information that you provide will help us to understand the issues from the SOF Operators' perspective. Your input will help us develop a comprehensive language and culture strategy for SOF. The SOF language and culture strategy influences how and what type of training and testing are done; how incentive pays are structured, etc. Thank you for taking time to talk with us today and caring about SOF language. Now, I want to introduce the person who will be conducting this focus group **[Moderator Name]**.

8:35/13:35

Moderator: Good morning/afternoon! I want to echo what **[SOFLO Liaison Name]** said. Your input is important to our project, and we appreciate your time. We will be using the information you provide to determine current language and culture requirements and other issues to inform future policy. Your opinions and experience play an important role in developing the SOF language and culture strategy.

When you arrived, you received a list of ground rules designed to ensure the session runs smoothly. **[Go over a few of the rules.]** If you have a comment, please get my attention by raising your hand or by some other means that doesn't disrupt the conversation.

Unclassified version
No names or ranks
Speak one at a time; Get my attention
Speak clearly, loudly and toward the microphone
Military Jargon and Acronyms

There are no "right or wrong" answers to our questions. We are interested in your honest thoughts and opinions. You'll notice that we are taking notes of our discussion, and we will be recording this focus group so that the transcripts can be analyzed. To protect your confidentiality, the introductions are not recorded and no names or group ids are assigned to the transcripts. Once the "media files" are transcribed, they will be erased (to prevent voice recognition).

As a psychologist, it's important to me to protect your confidentiality. I want to assure you that the transcript we make of our discussion will not be used for any purpose other than research and analysis. **No one involved in the focus group will be identified by name. The recorders will not be activated until after the introductions. When referring to yourself or others, please use only their participant numbers.** Please speak one at a time and regard the note taking as simply an extension of my (the moderator's) memory.

[Moderator will ask questions and summarize after each question as discussed.]

8:50/13:50

[Moderator should remind the participants to communicate critical incidents in such a way that they are unclassified.]

First Question Block

Part 1: Language Usage & Capability Requirements:

Q1: *“Tell us about a situation where having language skills and capabilities contributed to mission success?”*

- *What was the proficiency level? How many on the team had language capability?*
- *Which of the core SOF tasks (e.g., DA, SR, FID) were involved?*
- *Was the mission inside or outside your AOR?*
- *Did you use an interpreter? (Was the interpreter a contractor or military linguist?)*
- *Did you do pre-mission language prep?*
- *Did you use job aids (e.g., Kwikpoint) to help prepare? If yes, what’s your evaluation of the job aid?*

Q2: *“Tell us about a situation where not having sufficient language skill or capabilities was a challenge for the mission or degraded the mission outcome?”*

- *Which of the core SOF tasks (e.g., DA, SR, FID) were involved?*
- *How did it take away from mission accomplishment?*
- *How did you overcome not having sufficient language capabilities?*
- *How would having better language skills enhance the mission?*

Q3: *“Which SOF mission activities require language capabilities? Please be specific in terms of language skill type (reading, listening, speaking, writing), activity (e.g., training troops on weapon maintenance, negotiation, etc.), and criticality of the activity. Be as descriptive as possible when talking about the specific activities.”*

Q4: *“What types of language capabilities should the team have? Should everyone on the team (or only a few) have some capability? What levels of capability should the team have? Should there be multiple languages on a team?”*

Part 2: Cultural Knowledge and Awareness Requirements:

Q5: *“Tell us about a situation where having cultural knowledge and awareness contributed to mission success?” (Provide as much detail as possible)*

- *Which of the core SOF tasks (e.g., DA, SR, FID) were involved?*
- *Did you have any pre-mission culture training?*

Q6: *“Tell us about a situation where not having sufficient cultural knowledge and awareness was a challenge for the mission or degraded the mission outcome?”*

- *Which of the core SOF tasks (e.g., DA, SR, FID) were involved?*
- *How did it take away from mission accomplishment?*
- *How did you overcome not having sufficient cultural knowledge and awareness?*
- *How would having better cultural knowledge and awareness enhance the mission?*

[Moderator summarizes first block and reminds participants to add any additional comments from the first block on the survey.]

9:35/14:35

Second Question Block (Training):

[Moderator may not get to all of the following questions, so they should be mixed up across groups. But, get to as many as possible.]

Q7: *“Where do you think language and culture training should be provided/offered in the development of a SOF operator? Please think about this question across the entire career lifecycle and in terms of all forms of training (e.g., pre-deployment).”*

- *Should institutional, involuntary training be provided for [their SOF component]?*

Q8: *“We are interested in your experiences with language/culture training. Tell us about the most effective language/culture training in which you have participated. Be sure to consider all forms of training (e.g., pre-deployment). Be descriptive in terms of why it was effective.”*

Q9: *“Tell us about the least effective language/culture training in which you have participated. Be sure to consider all forms of training from initial acquisition to sustainment and enhancement. Be descriptive in terms of why it was not effective.”*

Q10: *“What are your thoughts on FLPB (Foreign Language Proficiency Bonus)? Are you motivated to increase your language proficiency level as a result of this incentive?”*

Q11: *“What are your thoughts on language testing? Are the current tests an adequate indicator of your language proficiency?”*

[Moderator summarizes second block and reminds participants to add any additional comments from the second block on the survey.]

10:20/15:20

[Moderator will summarize entire focus group session. Be specific about any themes that emerged from the discussion.]

Before we conclude does any one have any additional comments or topics related to language or culture that they would like to discuss. **[Remind participants to take a few minutes and complete the survey.]**

[To SOFLO Liaison] Do you have any thing you would like to add?

Thank you all for your generosity in taking the time out of your busy schedules to talk with us today.

[Moderator ends interview.]

APPENDIX F: LCNA SURVEY TOPIC AREAS

Survey Topic	Operator Version	Leader Version
SOF Unit Assignment	<p>This section contained questions identifying respondents' current assignment in the SOF community (e.g., USSOCOM, USASOC, AFSOC, TSOC, etc.). Both operators and leaders received the same set of questions.</p> <ul style="list-style-type: none"> • Follow-up questions were customized depending on answers to the current assignment item. • SOF operators, SOF operators assigned to another duty, and those currently in the training pipeline were asked to report their MOS or to choose their SOF type. 	
Language Background	<p>This section contained questions about respondents' language background, including:</p> <ul style="list-style-type: none"> • Native/first language • Yes/No in a language coded position • If yes, indicate current official or required language and any additional languages • Self-rate current proficiency • Usefulness of current official or required language for missions 	<p>Leaders responded to the same items as operators, plus additional questions, including:</p> <ul style="list-style-type: none"> • Current language testing status • Questions about receiving FLPB
Use of Language and Culture Branching Items	<p>These questions asked operators to classify their deployment experience in the past 4 years for use in branching to inside or outside AOR sections. Leaders responded to the same questions, but classified their unit's deployments during their tenure.</p>	

Survey Topic	Operator Version	Leader Version
Inside AOR Use of Language and Culture	<p>Operators with relevant experience were asked about the use of language and culture on their most recent inside AOR deployment. This section included questions on the following topics:</p> <ul style="list-style-type: none"> • General questions about the mission • Personal and team language proficiency • Frequency and importance of 17 language tasks/activities in relation to the mission • Ease/difficulty in meeting language/culture requirements of deployment • Types of vocabulary and modalities used • Use of interpreters and job aids • Preparedness and importance of language and culture • Pre-deployment language and culture training 	<p>Leaders responded to the same questions as operators, but responded based on their unit's typical/average deployment inside the AOR.</p> <ul style="list-style-type: none"> • Several questions referencing specific details about the mission were omitted here (e.g., details about language proficiency on the mission, specific use of interpreters on the mission). • Leaders only responded to this topic if they indicated they were in a position to comment on it.
Outside AOR Use of Language and Culture	<p>These questions were identical to the inside AOR questions with a few exceptions. Operators were not asked about the type of vocabulary or language modalities used. The following were additional topics:</p> <ul style="list-style-type: none"> • Use of language in the deployment location • Time spent maintaining current AOR language 	<p>Leaders responded to the same questions as the operators, with the following differences:</p> <ul style="list-style-type: none"> • Several questions referencing specific details about the mission were omitted here (e.g., details about language proficiency on the mission, specific use of interpreters on the mission). • Leaders only responded to this topic if they indicated they were in a position to comment on it.

Survey Topic	Operator Version	Leader Version
Use of Interpreters	<p>This section asked operators about their general use of interpreters on a mission in the past 4 years. Topic areas included:</p> <ul style="list-style-type: none"> • Pre-deployment training on using interpreters • Frequency of using interpreters • Issues with using interpreters • Mission effectiveness without using interpreters • Tasks requiring the use of an interpreter <p>The final question in this section asked operators to indicate which type(s) of interpreters they used in order to branch to the use of interpreter sections below.</p>	<p>Leaders were asked similar questions about their unit's use of interpreters. However, many of the questions specifically asked about the use of interpreters on inside versus outside AOR deployments instead of across all deployments.</p>
Use of Interpreters (CAT I)	This section asked operators general questions about their use and experiences with using CAT I interpreters. Leaders were asked the same questions about their unit's use of CAT I interpreters.	
Use of Interpreters (CAT II/III)	This section asked respondents general questions about their use and experiences with using CAT II/III interpreters. Leaders were asked the same questions about their unit's use of CAT II/III interpreters.	
Use of Interpreters (09L)	This section asked operators to rate the overall effectiveness and satisfaction with using an 09L. Leaders were asked the same questions from the perspective of their unit.	
Individual Language Proficiency Requirements	These questions asked operators to rate the proficiency needed (in each modality) for a person in their role to be prepared for the typical mission. Leaders were asked to rate the proficiency needed for an operator in their unit to be prepared.	
Team Composition	<p>This section asked questions about the composition of language proficiency required at minimum for a team/platoon member to be prepared for the typical mission. Operators received a customized item based on the total number of members on their team/platoon. Leaders received identical items to answer about the typical operator in their unit.</p> <ul style="list-style-type: none"> • Units whose number of team members was unknown were asked to indicate the number of members on their team, and then answered the items about minimum proficiency. • Questions also asked about several issues and their importance to team composition. 	

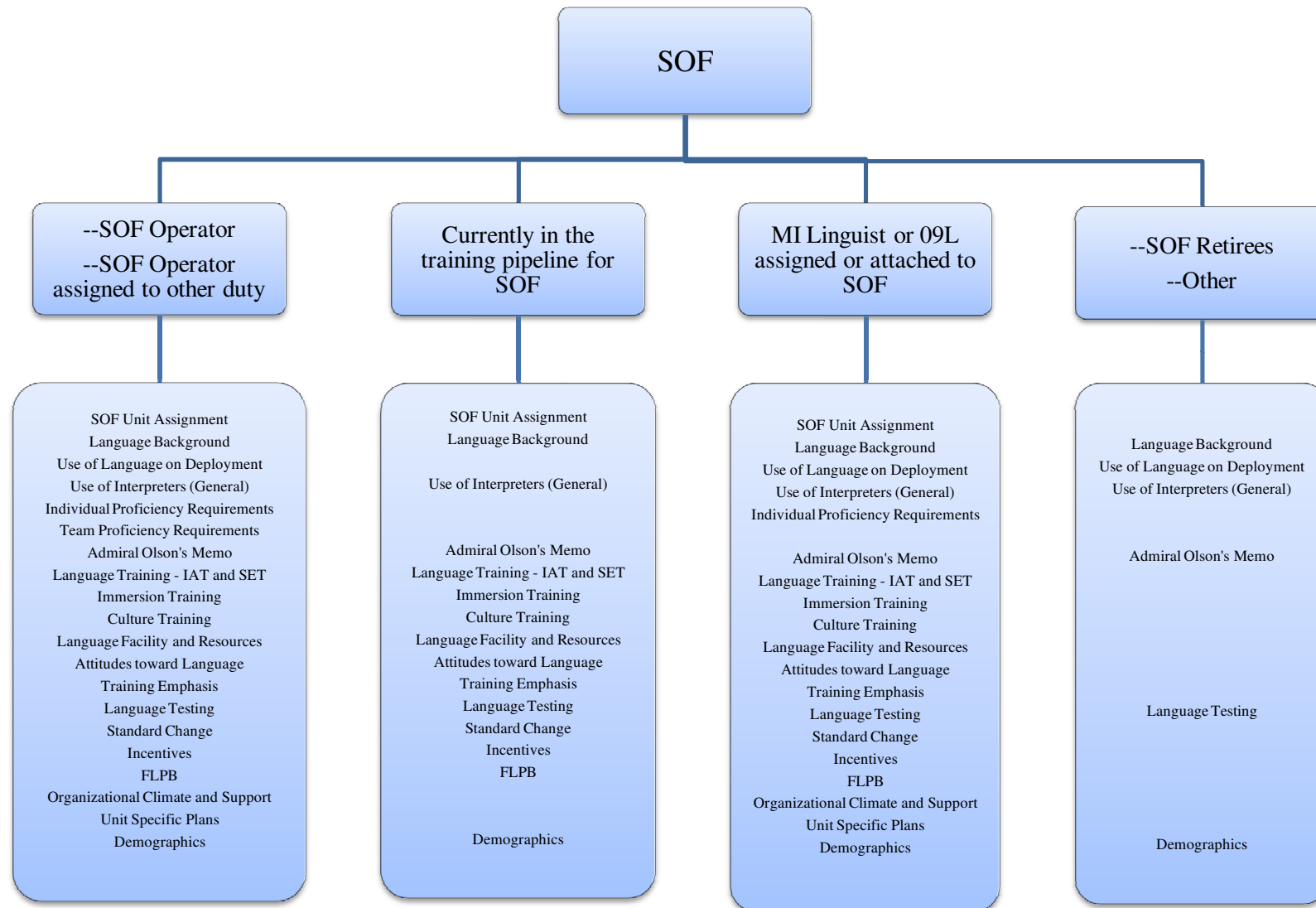
Survey Topic	Operator Version	Leader Version
Reaction to Admiral Olson's Memo	Both operators and leaders were asked if they were aware of Admiral Olson's memo and to identify any challenges in achieving the goals indicated. They were also asked about what could be done to facilitate achieving these goals.	
Language and Culture Training	This section included two branching questions to identify the most recent type of government sponsored training received.	
Initial Acquisition Training (IAT) Evaluation	<p>This section asked questions about the IAT operators received. Topics included:</p> <ul style="list-style-type: none"> • Source and mode of training • Curriculum evaluation • Instructor evaluation • Usefulness of training 	The leader version of these items asked about operators' language proficiency when arriving at the unit.
Sustainment/Enhancement Training (SET) Evaluation	This section asked questions about SET similar to the IAT questions. Additionally, questions about changes in proficiency levels after training were asked.	Only CLPMs were asked about SET, see <i>CLPM Training Items</i> .
Immersion	<p>Operators were asked general questions about the most recent type of government sponsored immersion training they participated in. Topics included:</p> <ul style="list-style-type: none"> • Duration and location of training • Effectiveness and usefulness of training • Changes in proficiency as a result of training 	<p>Leaders were asked about the types of immersion opportunities available at their unit and then branched based on their response. Leaders could have received general immersion training questions on:</p> <ul style="list-style-type: none"> • CONUS Immersion Training • OCONUS Immersion Training • Both CONUS and OCONUS <p>Leaders whose units do not provide immersion opportunities were asked a general question about recommendations for an immersion training program.</p>
Culture Training	Operators were asked general questions about the most recent government sponsored culture training they received. Leaders responded to the same questions about the culture training their operators receive.	

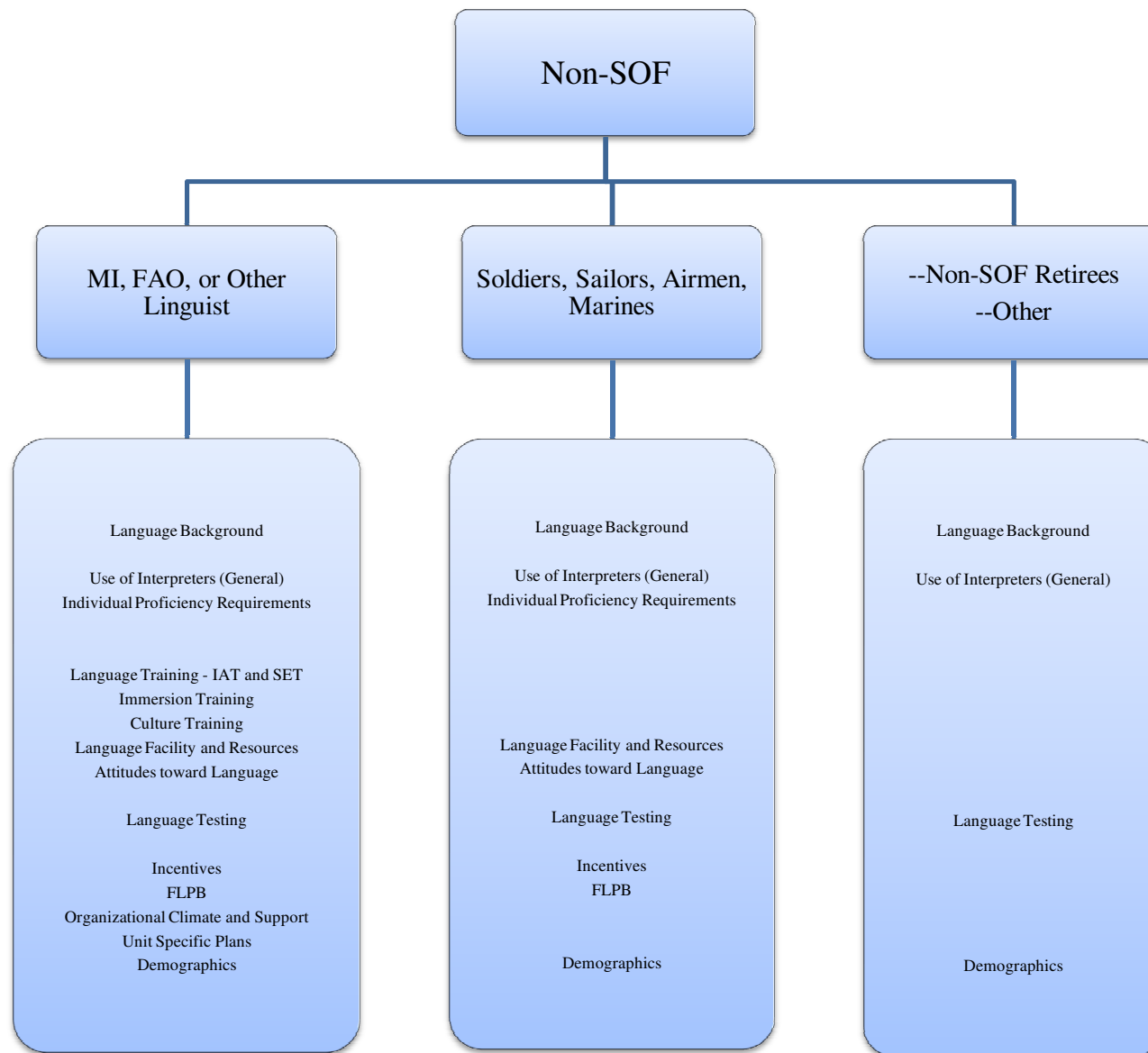
Survey Topic	Operator Version	Leader Version
Self-Study Materials	<p>This section asked operators questions about their language facility and resources. Topics included:</p> <ul style="list-style-type: none"> • Types of resources available • Effectiveness of available resources • Ease/difficulty in accessing resources • Time spent on language learning/maintenance 	See <i>CLPM Training Items</i> .
Attitudes towards Language	<p>These questions assessed respondents' interest and motivation for learning a foreign language. Respondents were also asked to indicate their confidence in their ability to perform 12 tasks/activities using their language skills.</p>	
Training Emphasis	<p>Operators and leaders were asked to indicate the amount of training emphasis necessary for a number of culture and language tasks/activities to prepare <i>operators</i> for their missions. Training areas included:</p> <ul style="list-style-type: none"> • Giving commands • Using street dialect • Reading signs, graffiti, and maps • Rules of etiquette in the deployment region • Customs, conventions, and norms for behavior 	
Testing Background	<p>Operators responded to general questions about their testing background, including DLPT, OPI, and DLAB. Leaders responded to the same questions about the testing background of their operators. Topics included:</p> <ul style="list-style-type: none"> • General questions about the most recent DLPT and/or OPI taken • Issues when taking the DLPT or OPI • How related the DLPT or OPI is to the job • Accuracy of the DLAB in assessing language learning aptitude 	
Standard Change	<p>Operators and leaders were asked two questions about their reaction to the recent test of record change for USSOCOM.</p>	

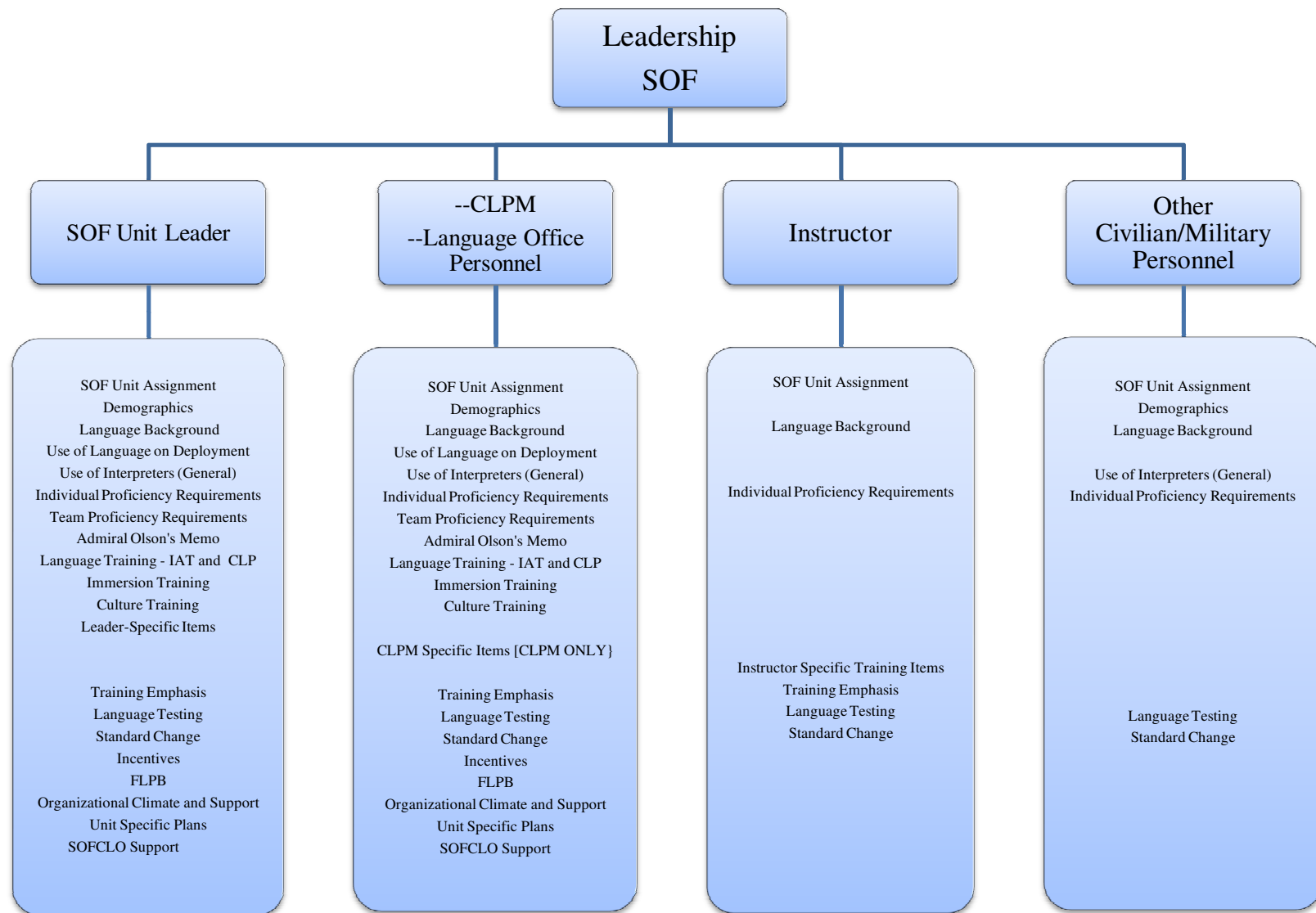
Survey Topic	Operator Version	Leader Version
Monetary and Non-monetary Incentives	<p>In this section, operators and leaders were asked their opinion on making language part of the promotion process. Additionally, they indicated how motivated operators are to acquire/maintain proficiency based on several incentives. Incentives included:</p> <ul style="list-style-type: none"> • Mission success • Monetary incentives (i.e., FLPB) • Opportunities for training • Immersion opportunities 	
Foreign Language Proficiency Bonus (FLPB)-specific Items	<p>This section asked operators about their experiences with FLPB. Leaders were asked about their units' experiences. Questions about FLPB included:</p> <ul style="list-style-type: none"> • How motivating is FLPB • How fair are the procedures related to FLPB • How could FLPB be more motivating 	
Barriers	<p>Questions in this section asked operators and leaders about the organizational climate and support at their unit. Topics included:</p> <ul style="list-style-type: none"> • Grading your chain of command • Potential barriers to acquiring/maintaining proficiency • Language priority when compared to other training requirements 	
Unit Specific Plans	<p>If respondents wanted to provide additional comments or recommendations, this section included an open-ended question regarding improving language capability in the unit. Leaders were asked what they are currently doing at their units to improve capability.</p>	
Demographics	<p>This section contained background questions about survey participants. Items included:</p> <ul style="list-style-type: none"> • Tenure • Deployment in the past 2 years • Number of deployments inside v. outside the AOR • Grade 	<p>Leaders were asked similar questions, including:</p> <ul style="list-style-type: none"> • Position • Staff section • Level of command • Grade • Tenure

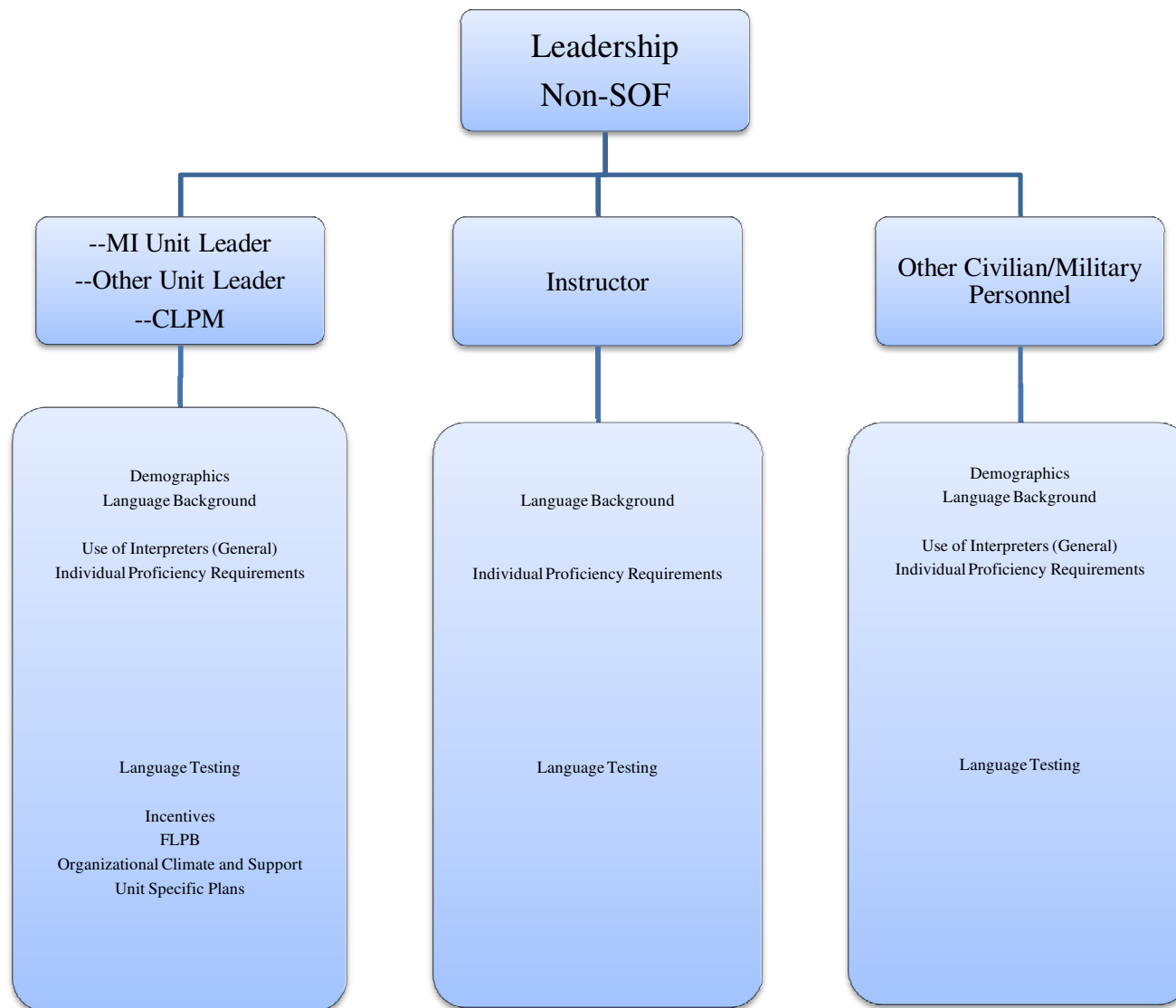
Survey Topic	Operator Version	Leader Version
Command Language Program (CLP) Training		<p>Leaders were asked general questions about the CLP at their unit. Topics included:</p> <ul style="list-style-type: none"> • Type of training available • Overall quality of various aspects of training • Satisfaction with quality of CLP
Leaders Only		<p>This section only asked leaders questions about training issues, mission planning, and resource availability.</p>
Special Operations Forces Culture and Language Office (SOFCLO) Support		<p>Leaders were asked questions about the SOFCLO, including:</p> <ul style="list-style-type: none"> • Awareness of the SOFCLO • Support received from the SOFCLO
Command Language Program Manager (CLPM) Training Items		<p>This section only asked CLPMs questions about the language facility and training at their unit. Topics included:</p> <ul style="list-style-type: none"> • Curriculum evaluation • Instructor evaluation • Student evaluation • Resource availability • SET
Instructor		<p>These questions were specific to instructors only. Topics included:</p> <ul style="list-style-type: none"> • Student evaluation • Incentives that motivate students • Barriers preventing students from acquiring/maintaining proficiency

APPENDIX G: BRANCHING CHART









APPENDIX H: ADMIRAL OLSON'S MEMO


UNITED STATES SPECIAL OPERATIONS COMMAND
OFFICE OF THE COMMANDER
7701 TAMPA POINT BLVD.
MACDILL AIR FORCE BASE, FLORIDA 33621-5323

30 October 2009

MEMORANDUM FOR SEE DISTRIBUTION

SUBJECT: Participation in United States Special Operations Command Language and Culture Needs Assessment Survey

1. Request your support of and participation in the United States Special Operations Command Language and Culture Needs Assessment (LCNA). This survey provides information to leaders, planners, and trainers to ensure Special Operations Forces personnel have the language and culture capabilities needed to support their missions.
2. Our language and culture staff conducted a series of focus groups throughout the Command. The results were used to develop survey questions. The LCNA will be administered online from 2 through 13 November 2009.
3. The survey link will be on Defense Knowledge Online and sent in emails to component language managers for distribution. The survey link is below.
https://swa.qualtrics.com/SE?SID=SV_3dZAg1ijsxpYXvC&SVID=Prod
4. The point of contact is Mr. Donnelly, DSN 299-6040, commercial (813) 826-6040, or email john.donnelly@socom.mil or john.donnelly@hq.socom.smil.mil.


ERIC T. OLSON
Admiral, U.S. Navy
Commander

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SOCC

SUBJECT: Participation in United States Special Operations Command Language and Culture Needs Assessment Survey

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